

State of Texas  
Records Retention Schedule

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Automated Facsimile of SLR-105

2. AGENCY CODE: 537

3. AGENCY: TEXAS DEPARTMENT OF STATE HEALTH SERVICES

4. Records

Series Item # 5. Agency  
Item #

7. RETENTION PERIOD

\_\_\_ ORIGINAL SUBMISSION

\_\_X\_\_ RECERTIFICATION

\_\_\_ REPLACEMENT PAGE

\_\_\_ ADDENDUM PAGE

10. 106 No.

Series Item #	5. Agency Item #	6. Records Series Title	Agency	Storage	Total	8. Archival	9. Remarks	10. 106 No.
300 - DIVISION FOR REGIONAL AND LOCAL HEALTH SERVICES								
	6863	SERVICE LEVEL AGREEMENTS WITH HEALTH SERVICE REGIONS	5		5		(REGIONS HAVE CONVENIENCE COPY.)	
	6878	TEXAS LAW ENFORCEMENT ELECTRONIC TELECOMMUNICATION SYSTEM LOGS	1		1			
	6905	PACKAGE DISASTER HOSPITAL	US		US			
1.1	1448	PROGRAM OBJECTIVES - EVALUATION (COMMUNITY MOBILIZATION)	AC+3		AC+3		AC=ACTIVITY COMPLETED	
1.1	1705	REGIONAL QUARTERLY REPORTS (COMMUNITY MOBILIZATION)	AC+3		AC+3		AC=DATE OF THE REPORT	
1.1	3728	LOCAL (COUNTY) PUBLIC HEALTH SYSTEMS DEVELOPMENT (COMMUNITY MOBILIZATION)	AC+3		AC+3		AC=ACTIVITY COMPLETED	
1.1	3942	HEALTH AUTHORITY APPOINTMENTS	AV		AV	R		
1.1	5667	CONTINUING EDUCATION MEETING MINUTES-OFFICIAL	FE+2		FE+2			
1.1.007	3020	INNOVATION GRANT CONTRACTOR FILES	4		4	R	Vital Record. ONLY ADMINISTRATIVE CORRESPONDENCE OF EXECUTIVE STAFF, BOARD OR COMMISSION MEMBERS, DIVISION DIRECTORS AND SECTION/UNIT/BRANCH HEADS REQUIRE ARCHIVAL REVIEW.	
1.1.007	3924	CORRESPONDENCE, ADMINISTRATIVE (ADMINISTRATION) (LIMITED TO FORMULATION, PLANNING, IMPLEMENTATION, INTERPRETATION, MODIFICATION, OR REDEFINITION OF THE PROGRAMS, SERVICES OR PROJECTS & THE ADMINISTRATIVE REGULATIONS, POLICIES AND PROCEDURES THAT GOVERN THEM.)	4		4	R	Vital Record. ONLY ADMINISTRATIVE CORRESPONDENCE OF EXECUTIVE STAFF, BOARD OR COMMISSION MEMBERS, DIVISION DIRECTORS AND SECTION/UNIT/BRANCH HEADS REQUIRE ARCHIVAL REVIEW.	

RETENTION CODES (Field 7)

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1.1.007	4266	ADMINISTRATIVE CORRESPONDENCE (PHHS BLOCK GRANT ADVISORY COMM) (LIMITED TO FORMULATION, PLANNING, IMPLEMENTATION, INTERPRETATION, MODIFICATION, OR REDEFINITION OF THE PROGRAMS, SERVICES OR PROJECTS & THE ADMINISTRATIVE REGULATIONS, POLICIES AND PROCEDURES THAT GOVERN THEM.)	4		4	R	Vital Record. ONLY ADMINISTRATIVE CORRESPONDENCE OF EXECUTIVE STAFF, BOARD OR COMMISSION MEMBERS, DIVISION DIRECTORS AND SECTION/UNIT/BRANCH HEADS REQUIRE ARCHIVAL REVIEW.
1.1.008	3925	CORRESPONDENCE, GENERAL (ADMINISTRATIVE SUPPORT) (LIMITED TO DOCUMENTING THE ROUTINE OPERATIONS OF THE POLICIES, PROGRAMS, SERVICES OR PROJECTS.)	2		2		INCLUDES SOME E-MAIL.
1.1.013	3682	CALENDARS, APPOINTMENTS, ITINERARIES	CE+1		CE+1	R	INCLUDES OUTLOOK CALENDAR. ONLY CALENDARS, APPOINTMENT, AND ITINERARY RECORDS OF EXECUTIVE STAFF, BOARD OR COMMISSION MEMBERS, DIVISION DIRECTORS AND SECTION/UNIT/BRANCH HEADS REQUIRE ARCHIVAL REVIEW.
1.1.019	1603	NEWS OR PRESS RELEASES (COMMUNITY MOBILIZATION)	2		2	R	SEND PAPER OR MICROFILM COPIES TO THE STATE ARCHIVES.
1.1.020	6417	PUBLIC INFORMATION REQUESTS - NOT EXEMPTED	AC+1		AC+1		AC=DATE REQUEST FULFILLED
1.1.021	6418	PUBLIC INFORMATION REQUESTS - EXEMPTED (DENIED)	AC+2		AC+2		AC=DATE OF NOTIFICATION THAT RECORDS ARE EXEMPT.
1.1.023	3683	ORGANIZATION CHARTS	US		US	A	
1.1.024	3953	PLANNING RECORDS	AC+3		AC+3	R	AC=DECISION MADE TO IMPLEMENT OR NOT TO IMPLEMENT RESULT OF PLANNING PROCESS
1.1.027	3022	PROPOSED LEGISLATION	AV		AV		
1.1.040	3911	SPEECHES	AC		AC	R	AC=END OF TERM IN OFFICE OR TERMINATION OF SERVICE IN A STATE POSITION.

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1.1.043	4937	TRAINING MATERIALS	US+1	US+1	
1.1.057	484	TRANSITORY INFORMATION	AC	AC	AC=PURPOSE OF RECORD HAS BEEN FULFILLED. INCLUDES TELEPHONE MESSAGE NOTIFICATIONS & SOME E-MAIL CONTAINING ROUTINE INFORMATION USED FOR COMMUNICATION, BUT NOT FOR THE DOCUMENTATION OF A SPECIFIC AGENCY TRANSACTION.
1.1.058	4509	MEETING AGENDA (PHHS BLOCK GRANT ADVISORY COMMITTEE)	PM	PM	A
1.1.058	4510	MEETING MINUTES (PHHS BLOCK GRANT ADVISORY COMMITTEE)	PM	PM	A
1.1.058	6896	MEETING AGENDA AND MINUTES (BIOTERRORISM COMMITTEE; HOSPITAL REPRESENTATIVES BIOTERRORISM COMMITTEE; COUNTY/STATE BIOTERRORISM COMMITTEE.)	PM	PM	A
1.1.060	1651	TAPES FROM LEGISLATIVE MEETINGS (PHP)	AC+90 DA	AC+90 DA	AUDIOTAPES; AC=OFFICIAL APPROVAL OF WRITTEN MINUTES FROM MEETING
1.1.060	4508	AUDIO OR VIDEOTAPES OF OPEN MEETINGS (PHHS BLOCK GRANT ADVISORY COMMITTEE)	AC+90 DA	AC+90 DA	AUDIOTAPES; AC=OFFICIAL APPROVAL OF WRITTEN MINUTES OF THE MEETING FY THE GOVERNING BODY OF AN AGENCY.
1.1.061	3044	LEGISLATIVE MEETING NOTES (PHP)	AC+90 DA	AC+90 DA	AC=OFFICIAL APPROVAL OF WRITTEN MINUTES
1.1.061	4506	MEETING NOTES (PHHS BLOCK GRANT ADVISORY COMMITTEE)	AC+90 DA	AC+90 DA	AC=APPROVAL OF THE FORMAL MINUTES BY THE GOVERNING BODY
1.1.062	3043	LEGISLATIVE MEETINGS SUPPORTING DOCUMENTATION (PHP)	2	2	A
1.1.062	4314	MEETINGS - SUPPORTING DOCUMENTATION (PHHS BLOCK GRANT ADVISORY COMMITTEE)	2	2	A

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300 - DIVISION FOR REGIONAL AND LOCAL HEALTH SERVICES									
1.1.063	3903	MEETING MINUTES/NOTES-STAFF	1		1				
1.1.063	4385	STAFF MEETING MINUTES (PHHS BLOCK GRANT ADVISORY COMMITTEE)	1		1				
1.1.065	3938	EVALUATION FORMS (TVHC)	AV		AV				
1.1.065	6895	REPORTS AND STUDIES (NON-FISCAL) - RAW DATA	AV		AV				
1.1.067	3923	REPORTS & STUDIES (NON-FISCAL)	3		3	R	IF REPORT HAS HISTORICAL RELEVANCE, DO NOT DESTROY REPORT BUT SEND IT TO THE STATE ARCHIVIST AT THE END OF THE RETENTION PERIOD.		
1.1.067	3940	L-1 QUARTERLY ACTIVITY REPORT (LOCAL HEALTH DEPARTMENT)	3		3	R	IF REPORT HAS HISTORICAL RELEVANCE, DO NOT DESTROY REPORT BUT SEND IT TO THE STATE ARCHIVIST AT THE END OF THE RETENTION PERIOD.		
1.1.067	6852	DISASTER INCIDENT REPORTS	AC	3	AC+3	R	AC=DATE OF FINAL REPORT ON THE RESPONSE. REVIEW PERIODICALLY FOR HISTORICAL VALUE. IF REPORT HAS HISTORICAL RELEVANCE, DO NOT DESTROY REPORT BUT SEND IT TO THE STATE ARCHIVIST AT THE END OF THE RETENTION PERIOD.		
1.1.069	3907	REPORTS, EMPLOYEES & ACTIVITY	1		1				
1.1.070	3905	POLICIES & PROCEDURES MANUAL- FINAL	AC+3		AC+3	R	Vital Record. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.		
1.1.071	920	RULES, POLICIES AND PROCEDURES-WORKING FILES	AC+3		AC+3	R	Vital Record. AC=COMPLETION OR TERMINATION OF PROGRAM, RULES, POLICIES OR PROCEDURES.		
1.2.003	3913	FORMS HISTORY FILE	AC+1		AC+1		AC=DISCONTINUANCE OF USE OF FORM		
1.3.002	3906	PUBLICATION DEVELOPMENT FILES	AV		AV	R	SLIDES, AUDIO TAPES, TRANSPARENCIES		
2.2.004	3947	COMPUTER JOB SCHEDULES AND REPORTS	3 MO		3 MO				

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2.2.016	5974	SOFTWARE REGISTRATIONS, WARRANTIES, AND LICENSE AGREEMENTS	LA+3		LA+3		Vital Record.	
3.1	3937	PERSONNEL ACTION LOG BOOK	1		1			
3.1	6694	POSITIVE PERFORMANCE RECORDS (MAINTAINED BY SUPERVISORS)	AC		AC		AC=FIRST LEVEL REMINDER IS 3 MONTHS; SECOND LEVEL REMINDER IS 6 MONTHS WITH A COPY TO EMPLOYEE'S MASTER EMPLOYEE FILE; THIRD LEVEL REMINDER IS 12 MONTHS WITH A COPY TO EMPLOYEE'S MASTER EMPLOYEE FILE. BEGINING AUGUST 2005 SUPERVISORS USE Employee Development Notes IN CAPPS TO DOCUMENT SECOND AND THIRD LEVEL REMINDERS, BUT A PAPER COPY IS STILL FORWARDED TO HHSC HR FOR EMPLOYEE'S MASTER PERSONNEL FILE.	
3.1.006	6821	EMPLOYEE COUNSELING NOTES	AC+3		AC+3		AC=TERMINATION OF COUNSELING. KEEP THIS RECORD SEPARATE FROM PERFORMANCE APPRAISAL.	
3.1.014	3920	EMPLOYMENT SELECTION RECORDS (INCLUDES APPLICATIONS FOR EMPLOYMENT-NOT HIRED)	2		2		Vital Record maintained by CAPPS only. Send all records to CAPPS. CAPPS HAS FULLY ASSUMED THIS FUNCTIONALITY AS OF SEPT 2006.	
3.1.019	481	PEFORMANCE APPRAISALS/JOURNALS	AC+5		AC+5		MAY CONTAIN SOME CONFIDENTIAL INFORMATION SUCH AS MEDICAL INFORMATION, SOCIAL SECURITY NUMBER, OR OTHER DATA PROTECTED BY THE PRIVACY DOCTRINE. AC=TERMINATION OF EMPLOYEE. CAPPS ASSUMED THIS FUNCTIONALITY IN AUGUST 2005. HHS-HR MUST RECEIVE ALL PERFORMANCE APPRAISALS THAT ARE NOT ALREADY IN CAPPS. HHS-OGC REQUESTED LONGER RETENTION PERIOD.	
3.1.023	3916	POSITION/JOB DESCRIPTIONS	AC+4		AC+4		Vital Record. AC=UNTIL SUPERSEDED OR JOB ELIMINATED. AccessHR ASSUMED THIS FUNCTIONALITY IN AUGUST 2005.	
3.2	5625	PAYROLL WARRANT LISTINGS	FE+5		FE+5			

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3.3	3912	TRAINING SUPPORT DOCUMENTATION	AC+2	AC+2 AC=COMPLETION OF TRAINING
3.3.023	5636	REIMBURSABLE ACTIVITIES, REQUESTS AND AUTHORIZATIONS (INCLUDES TRAVEL AND EDUCATION AUTHORIZATION REQUESTS)	FE+3	FE+3 TRAVEL OFFICE ASSUMED RETENTION OF TRAVEL REQUESTS BEGINNING OCTOBER 2005.
3.3.030	6722	TRAINING ADMINISTRATION RECORDS	US+2	US+2 (MATERIALS AND RECORDS FOR INHOUSE TRAINING OF AGENCY PERSONNEL OF POLICES AND PROCEDURES.) TRAINING MATERIAL NOT FOUND IN TRAIN OR CAPPs. (DOES NOT INCLUDE HAZARDOUS MATERIAL TRAINING RECORDS).
3.4.004	5006	OVERTIME AUTHORIZATION	FE+5	FE+5 BEGINNING OCTOBER 2005, RECORDS KEPT IN CAPPs.
3.4.007	3935	TIME OFF AND/OR SICK LEAVE REQUESTS	FE+5	FE+5 BEGINNING OCTOBER 2005, RECORDS KEPT IN CAPPs.
4.2.002	6692	CASH RECEIPTS	FE+3	FE+3
4.4.002	6100	ACCOUNTS RECEIVABLE LEDGERS	FE+3	FE+3 Vital Record. REMITTANCE LISTS INCLUDE DEPOSITS, REGISTRATION FEES FOR CONTINUING EDUCATION.
4.4.002	6665	FEMA REIMBURSEMENT	FE+3	FE+3 Vital Record.
4.5	720	BUDGET REVISIONS	FE+3	FE+3
4.5.002	6664	INTERNAL FISCAL MANAGEMENT REPORTS	FE+3	FE+3
4.5.005	6655	EXTERNAL FISCAL REPORTS	FE+3	FE+3
4.5.006	6625	ANNUAL OPERATING BUDGET	FE+3	FE+3

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4.7.008	3525	FEDERAL GRANT RECORDS	AC+3		AC+3		Vital Record. AC=SATISFACTION OF ALL UNIFORM ADMINISTRATIVE REQUIREMENTS FOR GRANTS AND COOPERATIVE AGREEMENT TO STATE AND LOCAL GOVERNMENTS (THE COMMON RULE)	
4.7.008	6533	FEDERAL GRANT RECORDS - ASTHMA GRANT	AC+3		AC+3		Vital Record. AC=SATISFACTION OF ALL UNIFORM ADMINISTRATIVE REQUIREMENTS FOR GRANTS AND COOPERATIVE AGREEMENT TO STATE AND LOCAL GOVERNMENTS (THE COMMON RULE)	
4.7.008	6583	FEDERAL GRANT RECORDS - CDC PUBLIC HEALTH PREPAREDNESS GRANT	AC	3	AC+3		Vital Record. AC=SATISFACTION OF ALL UNIFORM ADMINISTRATIVE REQUIREMENTS FOR GRANTS AND COOPERATIVE AGREEMENT TO STATE AND LOCAL GOVERNMENTS (THE COMMON RULE).	11-537-561
4.7.008	6615	FEDERAL GRANT RECORDS - HRSA HOSPITAL GRANT	AC	3	AC+3		Vital Record. AC=SATISFACTION OF ALL UNIFORM ADMINISTRATIVE REQUIREMENTS FOR GRANTS AND COOPERATIVE AGREEMENT TO STATE AND LOCAL GOVERNMENTS (THE COMMON RULE).	11-537-560
4.7.012	6531	SIGNATURE AUTHORIZATIONS	US+FE+3		US+FE+3			
5.1	3933	VOLUNTEER AGREEMENTS/MEDICAL INFORMATION	AC+5		AC+5		AC=DISCONTINUANCE OF PARTICIPATION	
5.1.001	6515	CONTRACTS	AC	7	AC+7		Vital Record. INCLUDES MONITORING FILES FOR BT OR HOSPITAL CONTRACTS. AC=EXPIRATION OR TERMINATION OF THE INSTRUMENT ACCORDING TO ITS TERMS.	(120)05-537-074; (500)10-537-555; (599)05-537-307; (550)10-537-554; (642)05-537-498;  05-537-383; 05-537-483
5.1.004	3025	MAIL AND TELECOMMUNICATIONS LISTINGS (ADDRESS AND TELEPHONE LISTINGS)	US		US		INCLUDES OUTLOOK DISTRIBUTION LISTS.	
5.1.007	6475	REQUISITION FOR IN-AGENCY/INTER-AGENCY COPY/PRINTING SERVICE	AV		AV			

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5.1.015	3926	CORRESPONDENCE LOG BOOK	1		1			
5.2	3930	PROPERTY INVENTORY/TRANSFER RECORDS	AC		AC		AC=INFORMATION IS PUBLISHED OR CORRECTED ON ANNUAL PHYSICAL INVENTORY BY PROPERTY OFFICE.	
5.3	3027	INNOVATION GRANT REQUESTS FOR PROPOSALS, FREQUENTLY ASKED QUESTIONS AND ANSWERS	FE+3		FE+3		PUBLISHED ON WEBSITE	
5.3	4409	PROCUREMENT CARD PURCHASES SUPPORTING DOCUMENTATION	FE+3		FE+3			
5.3.007	3023	REQUEST FOR PROPOSALS FOR TDH/DSHS INNOVATION GRANTS	FE+3		FE+3			
5.3.008	5665	PURCHASING LOGS	FE+3		FE+3			
5.4.001	5663	ACCIDENT REPORTS AND ASSOCIATED DOCUMENTATION	CE+2	3	CE+5		Vital Record. ACCIDENT OR OCCUPATIONAL DISEASE REPORTS BY SUPERVISORS AND EMPLOYEES REQUIRED TO BE SUBMITTED TO TEXAS WORKERS' COMPENSATION COMMISSION. BEGINNING OCTOBER 2005, AccessHR ASSUMED THIS FUNCTIONALITY. PRIOR TO OCTOBER 2005, RECORD COPY WAS SENT TO AGENCY RISK MANAGER.	
5.4.013	6456	FACILITIES & JURISDICTION EMERGENCY PLANS	US		US		Vital Record.	
5.4.013	6457	DISASTER PREPAREDNESS AND RECOVERY PLANS	US		US		Vital Record.	

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